

## BPA Policy 130-6

# Functional Statement for Office of the Chief Operating Officer

### Executive Office

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## 130-6.1 Office of the Chief Operating Officer

Office of the Chief Operating Officer (COO) reports to the Administrator and Chief Executive Officer for Bonneville Power Administration (BPA) and acts in his/her absence. The COO is a principal BPA executive and policy advisor to the Administrator and Chief Executive Officer (CEO) and is responsible for leadership of agency operations. The COO is the key strategy formulator for program operations, and is a Shared Senior Officer under Federal Energy Regulatory Commission (FERC) Standards of Conduct (SOC) rules. The COO oversees and provides direction and guidance for program execution and administration to the Senior Vice Presidents of Power Services (PS) and Transmission Services (TS), the Vice President of Environment, Fish and Wildlife, and Vice President and Chief Information Officer and Director, Customer Support Services.

The COO provides internal management oversight and leadership to enable the CEO to carry out the agency mission in accordance with statutory and contractual obligations, and achieve the agency's strategic business objectives.

The COO leads or has oversight over several executive-level decision-making bodies. The COO provides leadership to internal management efforts in the enhancement of performance of BPA systems, processes, and culture.

## 130-6.2 Environment, Fish and Wildlife

Environment, Fish and Wildlife (EF&W) is responsible for managing the environmental component of BPA's transmission and power sales businesses. This includes policy development, planning, and implementation of policies and strategies for environmental compliance associated with BPA actions, and addressing fish and wildlife issues integral to BPA's business responsibilities and its commitment to stewardship of the region's natural and cultural resources.

EF&W ensures that all BPA business functions such as policies, programs, and initiatives are carried out in accordance with established environmental laws and their associated regulations (e.g., National Environmental Policy Act (NEPA), Clean Water Act, National Historic Preservation Act (NHPA), Endangered Species Act (ESA), Northwest Power Act, and relevant state and local regulations and requirements, legal mandates, and prudent business practices. EF&W participates in environmental coordination at the regional level through new and ongoing relationships with other federal agencies, Indian tribes, state and local government, privately and publicly owned utilities, major manufacturers, professional groups, research and development organizations, congressional delegations and committees, natural resource groups, and the general public.

Within EF&W are three organizations; Environmental Planning and Analysis, Pollution Prevention and Abatement, and Fish and Wildlife (F&W) Program.

**A. Environmental Planning and Analysis** provides guidance and direction on the integration of environmental issues into BPA's business decision making. This function provides

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analysis and documentation of environmental compliance; strategic planning on environmental issues; NEPA decision integration and public involvement; cultural resource management; collaboration and coordination on environmental issues with federal, state, tribal, and other partners and regulatory agencies; and other environmental client services for all parts of the agency in a cost effective manner.

1. **Environmental Analysis** is responsible for ensuring statutory/regulatory environmental compliance requirements are accomplished through appropriate biological, physical, and cultural investigations and social and economic analyses of all BPA decisions and undertakings, including TS, PS, and F&W project actions, as well as agency-wide policy and programmatic direction. This function involves coordination of public involvement in environmental analysis, and building and sustaining collaborative and productive relationships with local, state, and federal agencies; tribes; nongovernment NGOs; and the general public in making BPA undertakings widely understood, socially acceptable, scientifically sound, environmentally sustainable, and legally responsible. This function documents environmental compliance through the preparation, publication, and distribution of appropriate NEPA analysis documents (Environmental Impact Statements (EISs), Standard Association (SA), Environmental Agency (EA), etc.) and associated decision documents (Records of Decision (ROD), Finding of No Significant Impact (FONSI), etc.), required consultations on ESA, required consultations associated with NHPA, and other compliance requirements. This function recommends appropriate mitigation; and coordinates with other groups to attain necessary permits and help guide implementation, effectiveness, and validation monitoring for environmentally sensitive efforts.
2. **Policy and Strategic Planning** provides guidance for meeting BPA's environmental obligations. The organization monitors emerging environmental issues and technologies that may potentially affect BPA business, sets precedence, involves unique or unusual circumstances, or otherwise have regional or national significance, and coordinates BPA's position and direction with Department of Energy (DOE), Environmental Protection Agency (EPA), and Council on Environmental Quality (CEQ). In concert with other groups inside and outside BPA, this organization manages environmental policy development and develops strategies and guidance to help achieve BPA's goal of environmental stewardship.
3. **Cultural Resource Program** manages BPA's cultural resources compliance, including developing policy, procedures, and guidance for agency compliance with Section 106 of the NHPA and other relevant statutes and guidelines. The Cultural Resource Program Manager coordinates with U.S. Army Corps of Engineers (Corps) and Bureau of Reclamation (BOR) to conduct compliance with cultural resource laws and regulations for 14 Federal Columbia River Power System (FCRPS) projects. This function conducts or coordinates Section 106 compliance for TS and EF&W projects. This function also

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consults with affected tribes, Tribal Historic Preservation Officers, and State Historic Preservation Officers on cultural resource issues.

**B. Pollution Prevention and Abatement (PP&A)** is responsible for developing, coordinating, and managing the implementation of environmental actions and compliance requirements associated with the operation, maintenance, and construction of BPA's transmission system. This function serves as the principal liaison and overall coordination point with TS. It is responsible for the coordination of budgets and expenditures associated with TS. This function develops, coordinates, and implements water protection, hazardous materials and herbicide management, erosion control, and other pollution prevention measures. It is responsible for environmental permits, plans, and specifications for transmission system projects along with overseeing implementation of environmental requirements during the construction of new or upgrade of transmission facilities. It manages the environmental training and herbicide-licensing program, and establishes environmental standards and procedures for the transmission system. This function is also responsible for managing BPA's environmental investigation, remediation and restoration, PCB equipment replacements, and secondary containment, storm water treatment and protection projects. It also manages overall Superfund liabilities for the agency and coordinates project scheduling to integrate work with other BPA organizations. In addition, it analyzes environmental laws, regulations, and policy initiatives for their implications on the operation and maintenance of the transmission system. This function oversees research and technological development initiatives in the pollution prevention and abatement field and administers BPA's environmental land audit programs and is responsible for external relations and negotiations with environmental regulatory agencies.

Technical and Regional Services provides scientific and technical environmental support to TS and other client organizations within the agency. It serves as liaison and coordination point for PP&A with Transmission Field Services regarding environmental compliance and implementation actions and measures. This function provides scientific and technical support in the implementation of environmental actions and compliance requirements at field sites. This function also assists field organizations in the proper handling and reporting of hazardous materials, providing environmental assistance in responding to spills, advising district and regional managers on all environmental compliance issues, and providing client interface with district and regional personnel. This function has responsibility for providing scientific and technical support for PP&A program/project planning and implementation. In addition, this function is responsible for environmental inspections, assessments, cleanups, pollution prevention measures, and monitoring at field sites. It is also responsible for Pollution Abatement clearances for transmission construction projects and environmental clearances for transmission maintenance projects.

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C. **The Fish and Wildlife (F&W) group** implements and participates in actions to meet BPA's fish and wildlife mitigation responsibilities under the Northwest Power Act and the ESA. BPA is required by law to mitigate the impacts to fish and wildlife to the extent affected by the construction and operation of the FCRPS. BPA's Fish and Wildlife group together with the other Action Agencies, the US Army Corps of Engineers (Corps) and the Bureau of Reclamation (BOR) implements ESA Biological Opinions on the impacts of the FCRPS on ESA listed fish and wildlife. This function includes developing, reviewing, and commenting on mitigation activities in the Columbia River Basin proposed for BPA funding under either the Northwest Power and Conservation Council's (Council) Fish and Wildlife Program or NOAA Fisheries/USFWS Biological Opinions. It includes project implementation, contract, and project management activities. This function also includes coordination of fish and wildlife resource issues with PS' and TS' real-time and long-term operations planning. This function develops policies and procedures for implementation of its fish and wildlife mitigation responsibilities and works closely with project sponsors, the Council, Corps, NOAA Fisheries, BOR, USFWS, Columbia Basin Fish and Wildlife Authority (CBFWA), individual tribes and state agencies, utilities and others.

1. **Business Operations Support (BOS)** guides and supports F&W managers and employees in the development, improvement, and deployment of business processes, in the identification, coordination, and management of supporting information technology, and the management of projects to develop, track, and monitor all costs for the F&W function. The information systems coordinated include support for F&W financial management, project management, and regionally shared systems. This function fulfills BPA's regional responsibility for financial data, including audit support, provides both internal and external financial reporting needs regarding F&W contracts, supports program portfolio, project and contract level data needs, management and documentation, tracks critical success indicators, as well as processing, tracking and monitoring F&W procurement actions.
2. **Policy and Planning** develops plans by participating in BPA's ESA consultations with NOAA Fisheries and USFWS, providing critical BPA policy positions that integrate biological needs of listed species with the needs of PS and TS, and developing Biological Opinion (Bi-Op)-related annual and five-year implementation plans that are coordinated with the Council's F&W Program, and other legislative and legal mandates. This function develops and maintains relationships with the Council, federal and state fish and wildlife agencies, Corps, BOR, Indian tribes, utilities, Columbia River hydroelectric system operators and regulators, special and private interest groups, and other interested parties. This function monitors and participates in the multiple sub-regional, ecosystem and watershed planning efforts in the Columbia River Basin. They represent BPA in various regional forums, such as NOAA Fisheries Regional Forum (System Configuration Team, Implementation Team, Technical Management Team), and CBFWA Members Committee. This function provides the planning for habitat, hatchery, harvest, fish and wildlife aspects of hydropower mitigation, and research,

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monitoring, and evaluation components of the annual and five-year implementation plans. This function also analyzes current and proposed individual dam and reservoir operations, system-wide hydro operations, and facilities resources. With information from these analyses, the group participates in both long-term and real-time power marketing and operations decision making. This function is involved in regional Research, Monitoring and Evaluation (RM&E), to ensure that research on critical uncertainties is performed and that Basin-wide RM&E results are integrated into the regional policy development and decision-making process.

3. **The F&W Implementation Units** (Oregon Implementation, Washington Implementation, and Idaho/Montana Implementation) implement projects that mitigate for the effects of the FCRPS in the Columbia River Basin. Projects are implemented as onsite and offsite mitigation efforts throughout the Basin and may include, but are not limited to, habitat, hatchery, and harvest-related efforts. Examples of project types that have been funded in the past include resident fish substitution; resident fish culture facilities; resident and anadromous fish and wildlife habitat protection and enhancement; wildlife mitigation agreements; ecosystem coordination; watershed coordination and planning; project implementation and effectiveness monitoring; anadromous fish hatcheries; tributary fish passage and screening projects; water rights acquisition; supplementation and captive brood stock research programs; ESA safety net hatchery programs; pacific lamprey reintroduction and studies, coded wire tag and Passive Integrated Transponder (PIT) tag fish marking, estuary habitat enhancement, and estuary and Columbia River plume research. Projects are contracted with a variety of state and federal fish and wildlife agencies, other state and local agencies, tribes, and private entities throughout the Columbia River Basin. Close coordination and collaboration with entities such as the Council, Corps, BOR, NOAA Fisheries, USFWS, CBFWA, individual tribes, and others is an essential part of project development and project and contract management within the group. This function represents BPA in various regional forums, such as the Council's Fish Committee, watershed councils, etc., for general program coordination and for specific projects for which the group has implementation responsibility.

### 130-6.3 Power Services

Pursuant to BPA's enabling statutes and in accordance with Power Services' mission to be a trusted steward of the Columbia River Power system, Power Services provides power and environmental value to the people of the Pacific Northwest. With considerable customer input and public involvement, Power Services manages the production and marketing of BPA's power products and services through the following organizations: Power Services Business Operations provides guidance in the areas of strategic direction and governance, and develops Power's market price and revenue forecasts; Energy Efficiency promotes the efficient use of energy through conservation in the Pacific Northwest and administers BPA's energy conservation contracts; Generation Asset Management develops plans, performs

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analysis, and interfaces with partners to manage generation resources for the production of electric power; Requirements Marketing maintains the business interface with BPA's public utility customers as well as develops power products and services offered by Power Services as well as the associated rates; Bulk Marketing performs all surplus power marketing, and account servicing for bulk power transactions. The Senior Vice President (SVP) provides executive-level leadership in guiding Power Services. The SVP is responsible for maintaining executive-level relationships with other BPA executives as well as executives at the helm of Power's customers, the Corps of Engineers, the Bureau of Reclamation, and Energy Northwest. The SVP ensures Power Services' strategy is integrated with the Agency's strategic direction. The SVP ensures that Power Services' efforts comply with internal agency policy, guidance, and business targets.

- A. **Power Services Business Operations** is responsible for leading and coordinating strategic direction, analysis, and governance activities within Power Services. As part of these responsibilities, Power Services Business Operations produces the Resource Program and provides analytical services, including firm power revenue forecasting, net secondary revenue forecasting, long-term natural gas price forecasting, long-term electricity market price forecasting, market assessment analysis, and risk analysis for Power Services.
- B. **Energy Efficiency** promotes the efficient use of energy in the Pacific Northwest. Energy Efficiency administers BPA's conservation acquisition contracts, provides technical and administrative support for BPA's market transformation activities, and produces and delivers energy efficiency programs, products, and services. Energy Efficiency provides leadership in conservation for the regional energy market and facilitates the development of cost-effective, direct-application renewable resources.
- C. **Generation Asset Management** is responsible for the financial and operational management of Federal Columbia River Power System (FCRPS) generating assets. The organization works with Federal and Non-Federal partners on capital and expense funding of FCRPS generating resources; the long-term, mid-term and short-term planning of generating resource capability; administration of the Slice power product; development of strategies in conjunction with the U.S. Army Corp of Engineers (USACE) and Bureau of Reclamation (Reclamation) to meet FCRPS power and non-power requirements for both the strategic and operational timeframes; and real-time implementation of FCRPS operations and power products.
- D. **Northwest Requirements Marketing** develops products, services, and rates. This function creates and maintains the business interface with BPA customers. It is responsible for meeting or exceeding established targets for sales and revenue, customer satisfaction, and costs. The Vice President provides executive leadership and strategic guidance for the marketing, selling, and servicing accounts processes including process improvements. Also, the Vice President provides resources to support the Requirements Marketing servicing functions.

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E. **Bulk Marketing** is responsible for long- and short-term marketing of surplus power including reserve services marketing, transmission acquisition, resource acquisition and scheduling coordination. These are supported by Bulk Marketing's pricing and analysis, contract administration, after-the-fact, and information management functions.

Bulk Marketing conducts all BPA non-requirements power marketing functions, including sales, purchases, and account servicing in the bulk power, reserves, transmission, and financial futures markets. Areas of responsibility include Pacific Northwest (PNW) wholesale marketers; utilities outside the PNW; and all active wholesale marketers and brokers in the Western Systems Coordinating Council (WSCC), both inside and outside the PNW, including Canadian and California markets. Bulk Marketing purchases transmission to support its marketing activities and manages transmission inventory. It represents Power Services in transmission policy forums and acts as Power Services' liaison with Transmission Services, the California Independent System Operator (CAISO), and other WSCC transmission parties. Bulk Marketing is responsible for all Power Services resource acquisitions and for managing BPA's renewable resource program.

## 130-6.4 Transmission Services

Transmission Services provides reliable open access, nondiscriminatory transmission service on the Bonneville Power Administration (BPA) transmission network for utilities, generators, and power marketers consistent with various regulatory requirements. This is done through marketing and selling transmission products and services, both regulated and unregulated. Transmission Services provides asset management services for the transmission assets of Federal Columbia River Power System (FCRPS) including transmission system planning, design, construction, operations, and maintenance.

A. **Aircraft Services** ensures aviation policy is aligned with BPA's business and transmission reliability needs, and is responsible for aviation safety, coordinating flight requests, and developing flight schedules as well as managing aircraft maintenance and operations.

B. **Transmission Student Development** is responsible for developing and training Transmission students in various disciplines throughout the Transmission Services organization.

C. **Engineering and Technical Services** is responsible for implementing the transmission capital program, providing technical support for the transmission maintenance program and providing real property services to the agency. This organization provides services supporting the capital program that include: project management, engineering, design, specifications, contract construction management, construction inspection and commissioning services. Projects include transmission lines, substations, control and protection systems, telecommunication facilities and nonelectric facilities. Services supporting transmission maintenance include developing maintenance standards, field and laboratory testing services, specialized technical training, equipment failure analysis, high level equipment and systems expertise, spare parts sourcing, and development of

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advanced maintenance techniques. Technical experts promote the development and integration of advanced technologies to improve system reliability and reduce costs.

- D. **Transmission Field Services** is responsible for managing field operations and maintenance and construction of BPA's high-voltage electrical transmission system and providing safe, reliable, and cost-effective service to customers. These responsibilities include physical field operations, maintenance, and construction of BPA's electric and non-electric plant facilities in the BPA service area.

The Vice President (VP) for Transmission Field Services reports to the Senior Vice President (SVP) of Transmission Services and provides advice and support to Transmission Field Services managers and employees. The Senior Operations and Maintenance Managers each have oversight for several Districts and are responsible for key policy formulation and decisions for long- and short-range strategic planning for the Transmission System. Through their own staffs and the Districts, the Senior Operations and Maintenance Managers assure that Transmission Field Services achieves the following overall results: safe power system for employees and the public; reliable electric service for customers; and cost effective operation, maintenance, and replacement of the BPA power system.

- E. **Transmission Internal Operations** is responsible for governance, oversight, strategic direction and other business services needed to ensure effective and efficient operation of Transmission programs in meeting their programmatic and strategic business objectives while complying with applicable law and regulations. The Transmission Internal Operations organization directly supports the Transmission Services Management Team in: developing business and risk management plans, policies, and processes; establishing Transmission Services-wide strategic management reports and assessments; monitoring and reporting on Transmission performance towards key targets and measures; administration of select Transmission wide internal operations programs; and managing NERC Reliability.

- F. **System Operations** is responsible for the safe, reliable, and open access operation and dispatch of the high voltage transmission system and interconnected generation. Responsibilities include operating and managing two regional control centers and representing BPA on operations and other issues through participation in regional and national groups and sponsoring and supporting Technology Innovation (TI) within the operations arena. System Operations staff support congestion management initiatives by providing planning, scoping, and project management activities on projects that lead to improvements in the tools available for the reliable operation of BPA's transmission system. The System Operations organization is also responsible for the Grid Operations Information System Security Program (GOISSP) which implements and maintains regulatory cyber security requirements applicable to Transmission Services' information and cyber systems used to operate, control and protect the transmission system.

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- G. Planning and Asset Management** is responsible for overseeing the transmission system asset management program to promote the reliability, efficiency and economical use of all transmission system physical assets. Responsibilities include overseeing the: development of both near and long-term activities and investments needed to meet BPA's long-term objectives and the development of capital and expense multi-year asset management strategies and plans by evaluating the current condition and capability of the transmission system and the ability to meet predicted demands, desired performance, risks to meeting performance targets and least life cycle costs; and the development and implementation of the transmission system asset management system framework, including the development and implementation of asset management standards, policies, processes, procedures, and functions.
- H. Transmission Marketing and Sales** provides open access to the Federal Transmission System (FTS) consistent with transmission tariffs approved by Federal Energy Regulatory Commission (FERC) Open Access Transmission Tariff (OATT). Responsibilities include leading the development and administration of long-term and short-term transmission services, providing ratemaking support, and margin management for Transmission Marketing and Sales including market intelligence, research, and analysis, which is used with other information to set cost and revenue targets. Transmission Marketing and Sales applies sound process management, decision support and data stewardship practices in managing the business processes, information, and tools that are necessary to conduct transmission commercial business effectively. Functions performed include managing the reservation and sale of all transmission services associated with the transmission tariff in a nondiscriminatory manner as well as ensuring commercial compliance oversight and direction for all transmission commercial functions.

## 130-6.5 Information Technologies (IT)

IT develops and supports agency-wide business automation systems and establishes the information technology architecture, planning process, and configuration standards for the agency. The Chief Information Officer (CIO) has overall responsibility and accountability for all BPA information technology-related governance. This includes establishing IT strategies, objectives, and performance standards in alignment with financial targets, agency strategic direction, and external mandates.

- A. Office of Cyber Security** provides IT governance and information assurance through the BPA Cyber Security Program, which supports the security of agency Cyber resources and networks, and compliance with applicable federal laws, regulations, Department of Energy directives, and agency policies. The office develops, implements, maintains and enforces agency Cyber Security policies and standards. The office also develops and manages agency information systems programs for certification and accreditation, risk assessment, external reporting and liaison, system continuous monitoring, security awareness and training for staff, critical infrastructure protection coordination, and incident and investigations management.

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**B. Critical Business Systems Development and Operations** organization provides 24x7 operations, monitoring, support and trouble-shooting of Bonneville’s identified critical business systems portfolio; and the design, development, and enhancement of critical business systems. This requires a sound, fundamental understanding of Power and Transmission business in order to provide customer focused system support. The organization is composed of multi-disciplined personnel to concentrate capabilities and improve service responsiveness. Additionally, the organization provides direction and leadership in the planning, development, and enhancement of critical business systems and work processes.

1. **Critical Business Systems Development organization** provides system integration and software engineering support for new/proposed critical business systems applications. Responsibilities include oversight to ensure new systems and approved enhancements to existing systems are completed using commonly accepted software engineering processes and practices and conform to the BPA Information Technology Architecture (BITA). This organization coordinates with system and data architects, server administration and database groups within the larger IT organization to ensure project requirements are met prior to implementation into the critical business systems production environment. This organization also provides application support, process improvements, and problem management and prevention for the agency’s critical business systems.
2. **Critical Business Systems Monitoring and Operations Desk organization** provides 24x7 monitoring of critical business systems applications and related infrastructure components. This organization also provides initial service interruption assessment and triage to computer and telecommunications problems, on-call dispatch and escalation, service restoration coordination, and client communications. In addition, the organization staffs a 24x7 support desk to monitor system health from network to applications and serves as first responder for scheduling user calls.
3. **Critical Business Systems Operations organization** provides fully integrated support for the agency’s critical business systems by providing multi-disciplined staff to support data, hardware and basic application support. The organization’s responsibilities include:
  - a. Infrastructure – High Availability hardware and system architecture; build, administer, maintain and operate all servers, data storage technologies, and related support services within the critical business system sub-network dedicated to the support of BPA’s critical business systems – including security, monitoring, and capacity planning. Maintain system configurations in compliance with the BITA standards and with other IT policies and guidelines.

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- b. Data - database administration and data integration including capacity planning, backup and recovery, database design, data integrity, data security, and monitoring of the agency's critical business systems database portfolio.
- C. **IT Program Management organization** provides budget planning and oversight, and hardware/software and supplemental resource management support for the IT organization. This includes supporting activities related to the IT budget and asset portfolio, hardware and software procurement, software license management, IT COTR contract management, and supplemental labor acquisition and administration.
- D. **Infrastructure Services organization** provides a broad range of information technology programs, systems and processes that are required to meet BPA information technology infrastructure needs for the administrative network. Responsibilities include the planning, design, coordination, configuration, installation, maintenance, and operation of data center services, system administration services, network services and infrastructure projects within the infrastructure to meet business requirements.
1. **Data Center Services organization** provides continual services to the range of IT disciplines in the Data Centers that include operations, change, configuration, incident, and performance management services. The Data Center Services group is responsible for daily operational tasks providing backup and restoration services, domain management, storage management, capacity planning, server hardware management, OS installation, and on-call support within the data center.
  2. **Infrastructure Admin Services organization** provides continual services to the range of IT disciplines in system administration that include access control, active directory, terminal services, messaging and enterprise scheduling. The Infrastructure Admin Services organization is responsible for the overall administration of the suite of tools that provide asset intelligence, configuration management, operations management, virtual machine manager, service manager, replication services, and software patch/upgrade deployment. Other responsibilities include security and virus alert response management.
  3. **Network Services organization** provides continual services to the range of IT disciplines in the network technology sector that include design, implementation, operation, troubleshooting, repairing, and maintaining data connectivity services to ensure operational uptime goals and project deliverables in the network infrastructure. Areas of responsibility include HQ, Ross, Munro, and field sites for cable plant, switch/router, circuits, telephone/voice/video services, interconnect, gateways, firewalls, intrusion detection, DNS, load balancing, and reverse proxy.
  4. **Infrastructure Projects organization** provides continual services to the range of IT disciplines in infrastructure asset management, document management, process management, project management, problem management, and COOP services. Infrastructure Projects is responsible for the infrastructure asset management that

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include hardware and software assets in data center and network, reviews and documents policies, develops and documents processes while working with the business partners to ensure adequate technical resources are aligned to meet business objectives.

- E. **IT Project Management Office (ITPMO)** manages the Agency's IT project portfolio to ensure an overall IT project delivery strategy within established budget and resource constraints. This organization publishes and is responsible for adherence to the system lifecycle (SLC) process. This organization is also responsible for predictable and transparent delivery of each IT project by employing sound project management practices and close coordination with the business lines and other IT departments. The ITPMO also establishes IT project management standards and governance, and provides training and certification to IT project managers.
- F. **Quality Control organization** provides production control, which includes production release management and version control for BPA applications. The quality control function also includes change management, configuration tracking, patch management, change auditing, coordination and governance of development, testing, evaluation labs, and outage analysis.
- G. **Service Delivery organization** plans, directs and manages a comprehensive client-facing IT program aligned to meet the agency's computing requirements. Responsibilities include the planning, design, coordination, and oversight for the configuration, installation, maintenance, client asset management, and operation of all computer workstations, and related office automation support services within the non-critical business system administrative network. This function, provided through Service Delivery Representatives acting as ombudsmen and a sounding board for client concerns, is responsible for planning and negotiating Operating Agreements between business line clients and Information Technology, provides analysis strategy support for the consideration and pursuit of new technologies or enhancement efforts for existing applications; and monitors the delivery of IT products and service to business line clients and assists in the resolution of delivery problems. This function coordinates, develops and manages the program for IT communications and outreach initiatives.
- 1. **Field Support Services** organization provides complete desk side services, including but not limited to the primary technology areas of workstations, peripherals, printers, and hand held devices in all locations outside the Portland/Vancouver metro area, excluding Washington DC. Field Services Support follows operating processes, procedures and practices, provides implementation and management of desk side hardware and software products, resolves client service problems and disruptions, and responds to all IT-related client requests and queries. It is responsible for providing workstation related trouble-shooting and remediation support to the entire agency including workstation moves, hardware and software maintenance, software patch deployment, vulnerability response, system tuning, general problem resolution and

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consultation services. Technicians may also provide field support for the Infrastructure Services organization.

2. **Help Desk and Outreach organization** provides a non-critical business systems client conduit; identification of service problem and disruptions, troubleshooting, and first call client support remediation. Responds to IT related client requests and queries to a wide range of services including, resource requests, office productivity software training, support for IT self-service initiatives, client solutions knowledgebase, client-based outreach programs, and technical support for BPA's telework program. This organization is responsible for IT client asset management including warehousing, tracking, deploying and recovery of all desktop hardware and software assets including but not limited to the primary technology areas of workstations, peripherals, printers, hand held devices and software; responsible to receive, record, store and issue assets in accordance with BPA's approved office automation plan.
  3. **Portland Client Support organization** provides complete desk-side services, including but not limited to the primary technology areas of workstations, peripherals, printers, and hand-held devices in the Portland location and Washington DC. This organization follows operating processes, procedures and practices, provides implementation and management of desk side hardware and software products, resolves client service problems and disruptions, and responds to all IT-related client requests and queries. It is responsible for providing workstation related trouble-shooting and remediation support to the Portland and Washington D.C. locations, including workstation moves, hardware and software maintenance, software patch deployment, vulnerability response, system tuning, general problem resolution, and consultation services.
  4. **Vancouver Client Support organization** provides complete desk-side services, including but not limited to the primary technology areas of workstations, peripherals, printers, and hand-held devices in the Vancouver location. This organization follows operating processes, procedures and practices, provides implementation and management of desk side hardware and software products, resolves client service problems and disruptions, and responds to all IT-related client requests and queries. It is responsible for providing workstation related trouble-shooting and remediation support to the Vancouver location, including workstation moves, hardware and software maintenance, software patch deployment, vulnerability response, system tuning, general problem resolution, and consultation services.
- H. **Software Development and Operations** organization provides operations, monitoring, support and troubleshooting of BPA's business systems portfolio; and the design, development, and enhancements of BPA's business and task systems. The organization is composed of multi-disciplined personnel to concentrate capabilities and improve service responsiveness. Additionally, the organization provides direction and leadership in the planning, development, and enhancement of agency business and task systems and work processes.

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1. **Agency Commercial Systems organization** provides system integration and software engineering support for the agency's commercial business applications. Authorized new systems and approved changes are completed using common, accepted software engineering processes and practices to reduce costs. This organization works with corresponding systems analysis groups to perform system/regression testing and ensures that requirements are met and reliability is maintained.
2. **Enterprise Applications organization** provides the functional support for implementation, upgrades, and maintenance for the following systems: Human Capital Management, Customer Relationship Management, Asset Suite, Annam's Sunflower, Legal Time & Labor, Debt Management, Enterprise Performance Management/Budget, and AIS. This work is accomplished in coordination with Enterprise Application Support Group.
3. **Business Applications organization** is responsible for configuration, development, support, administration, and management of agency business, general purpose and task systems. These systems include agency web and portal solutions supporting project management, content management, document management, and records management as well as web services, web applications, IIS administration, workflow and BPM technologies, forms management, and content publishing.
4. **Business Systems Operations organization** provides fully integrated support for BPA's business systems by providing multi-disciplined staff to support the business and task systems from the data and hardware level to basic application support. Their responsibilities include:
  - a. Infrastructure – Administer, maintain and operate all servers, data storage technologies, and related support services including security, monitoring, and capacity planning within the agency networks supporting BPA's business and task systems. Maintain system configurations in compliance with the BITA standards and with other IT policies and guidelines.
  - b. Data - database administration and data integration including capacity planning, backup and recovery, database design, data integrity, data security, and monitoring of BPA's business database portfolio.
  - c. Monitoring – Design, develop, operate and maintain end to end system monitoring within the agency networks supporting BPA's business and task systems. Provide initial service interruption assessment and triage to system problems, on-call dispatch and escalation; service restoration coordination, and client communications.
5. **Enterprise Applications Support organization** provides the technical support for implementations, upgrades, and maintenance for the following systems: Human Capital management, Customer Relationship Management, Asset Suite, and Annam's Sunflower, Legal Time & Labor, Debt Management, Enterprise Performance

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Management/ Budget, AIS, and CMS. This work is accomplished in coordination with Enterprise Applications.

6. **Data Integration and Reporting organization** provides reporting services, business intelligence, data warehousing and data integration. The staff is responsible for BPA's reports development, data modeling, and reporting services as well as the management and the delivery of services supporting a BPA common information model through the implementation of data integration architectures such as data warehouses, data marts, and data migration and solutions.
7. **Asset Management and Engineering Applications organization** provides data, application and software support, release migration, application expansion and integration for applications which: 1) support agency's geospatial information system (GIS); 2) support Computer Aided Design systems (CAD); and 3) support miscellaneous computerized systems that support the daily business activities of BPA's workers.

## 130-6.6 Customer Support Services

Customer Support Services provides Load Forecasting and Analysis, Customer Contract Management and Administration, Customer Billing, Customer Metering Services, and interfaces with front office organizations. Customer Support Services provides overall business management and integration for customer service systems. The Customer Support Services Director is the policy owner for BPA internal policies in the areas of customer billing, customer contracts (excluding agreements for Environment, Fish & Wildlife, Real Property, and Supply Chain), load forecasting and analysis, customer metering services, and related systems managed by Customer Support Services.

- A. Contract Management and Administration coordinates, manages, oversees, and directs all back office activities related to the lifecycle of customer contracts including primary back office customer contract review and monitoring, contract standardization, and contract administration. This function is responsible for developing and overseeing agency BPA internal customer contract governance policies, procedures, standards, and internal controls. Additionally, this function supports the development, approval, and implementation of all policies that the CSS Director owns. Finally, this function manages operation of the customer contract data and portal systems, including contract and customer data stewardship and responding to special requests for contract or customer data.
- B. Load Forecasting and Analysis is responsible for agency load forecasting and analysis, including planning, developing, and administration of programs, systems, and work processes that produce official and ad hoc load forecasts and associated analysis. This function is responsible for developing and overseeing load forecasting processes, policies, procedures, and internal controls. This function is also responsible for building, distributing, and providing data stewardship for load forecasts for use by Power Services (PS) and Transmission Services (TS), customer contact management and administration,

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billing, metering, and regional coordination. Load Forecasting and Analysis is the designated agency organization for all internal/external requests for loads information.

- C. Customer Billing is responsible for coordinating, managing, overseeing, and directing activities related to customer billing operations. These activities include accurate and timely bill preparation and issuance, revenue and billing data analysis, report preparation, customer bill reviews, and resolution of billing disputes with BPA transmission and power customers. This function is also responsible for developing and overseeing customer billing policies, procedures, standards, and internal controls. Customer Billing manages the operation of the centralized customer billing system, including billing data stewardship, and responding to special requests for billing data.
- D. Metering Services performs the agency revenue metering function and is responsible for coordinating, managing, overseeing, and directing activities related to the lifecycle of all revenue metering. This function is the single source of revenue meter data at BPA, and provides data retrieval, collection and storage, meter data validation, estimations, meter analysis, tracking, and information exchange. This function is also responsible for developing and overseeing metering policies, procedures, standards, and internal controls. Metering Services manages the operation of the centralized metering system, including metering data stewardship, and responding to special requests for meter data.

### 130-6.7 Review

BPA Functional Statements are reviewed and updated as required due to change in delegations of authority, statutory changes, or organizational changes

### 130-6.8 Revision History

Version	Issue Date	Description of Change
2	4/29/2015	Migrated to BPA Policy Template

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